

MY RETIREMENT PATHFINDER CLIENT QUESTIONNAIRE



1 YOUR PERSONAL DETAILS



TITLE	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other <input type="text"/>	
FORENAME	<input type="text"/>			SURNAME	<input type="text"/>	
ADDRESS	<input type="text"/>			EMAIL ADDRESS	<input type="text"/>	
COUNTY	<input type="text"/>			TELEPHONE	<input type="text"/>	
POSTCODE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
CIVIL STATUS	Single <input type="checkbox"/>	Married <input type="checkbox"/>	Civil Partnership <input type="checkbox"/>	Separated <input type="checkbox"/>	Divorced <input type="checkbox"/>	Widowed <input type="checkbox"/>

2 YOUR PENSION & OTHER INCOMES & EXPENDITURE IN RETIREMENT



TOTAL PENSION FUND VALUE (including PRSAs, PRBs, Personal & Company Pensions)

€

ARE YOU ENTITLED TO THE STATE PENSION?

☐ Yes ☐ No

If Yes, please enter the annual amount that you are entitled to

€

NET ANNUAL INCOME FROM EXISTING PENSIONS (IF ANY)

€

Start date of this income (if not already in payment)

D D M M Y Y Y Y

Enter the annual increase/decrease of this income (to a maximum of 5% p.a.)

%

YOUR EXPECTED NET ANNUAL EXPENDITURE IN RETIREMENT

€

NET ANNUAL INCOME FROM OTHER SOURCES (IF ANY)

€

Start date of this income (if not already in payment)

D D M M Y Y Y Y

End date of this income (if applicable)

D D M M Y Y Y Y

Enter the annual increase/decrease of this income (to a maximum of 5% p.a.)

%

DO YOU WISH TO APPLY AN EFFECTIVE RATE OF TAX (INCLUDING PRSI & USC WHERE APPLICABLE) TO ANY AMRF, ARF, ANNUITY INCOME PAYABLE IN RETIREMENT?

☐ Yes ☐ No

If Yes, please enter the relevant effective rate of tax (between 0% - 60%)

%

3 APPROVED (MINIMUM) RETIREMENT FUND ELIGIBILITY



Do you have a guaranteed pension for life of at least €12,700 per annum, including the single state pension entitlement?

☐ Yes ☐ No

Have you invested €63,500 of your pension fund to invest into an Approved Minimum Retirement Fund or the purchase of an annuity for life?

☐ Yes ☐ No

Have you inherited these funds following the death of the original ARF/AMRF holder?

☐ Yes ☐ No